



New Mexico Agricultural
Statistics Service

Weekly Ag Update

Issue 52-16

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INCLUDED IN THIS ISSUE

Crop Weather Cotton & Wool Outlook

Available on internet at: www.nass.usda.gov/nm OR by e-mail: (call 1-800-530-8810 for information)

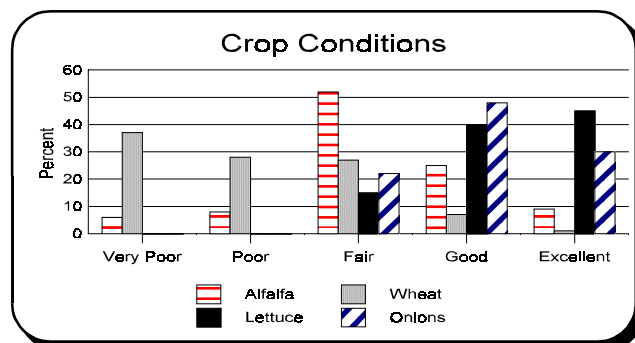
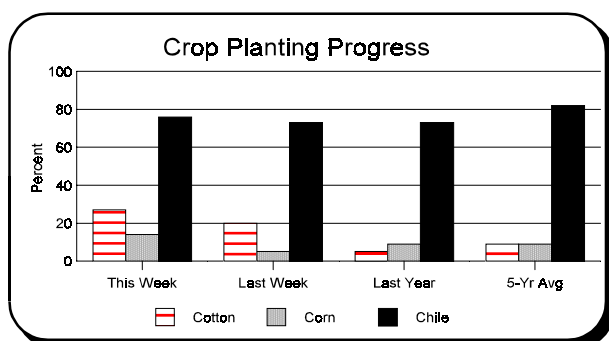
CROP SUMMARY FOR THE WEEK ENDING APRIL 14, 2002

NEW MEXICO: There were 6.8 days suitable for field work. Wind damage included 21% light, 11% moderate and 3% severe. Farmers continued to plant spring crops with planting progress as follows; chile at 76%, corn at 14%, and cotton at 27%. The chile crop seems to be emerging in fair to excellent condition. Alfalfa was looking good with over half of the crop in fair to excellent condition. Total wheat was in mostly very poor to fair condition. Wheat headed was at 9%. Lettuce and onions were in fair to excellent condition. Livestock conditions continued to decline with heavy watering and supplemental feeding taking place. Pasture and range feed conditions were listed as 38% very poor, 38% poor, 22% fair, and 2% good.

CROP PROGRESS PERCENTAGES WITH COMPARISONS

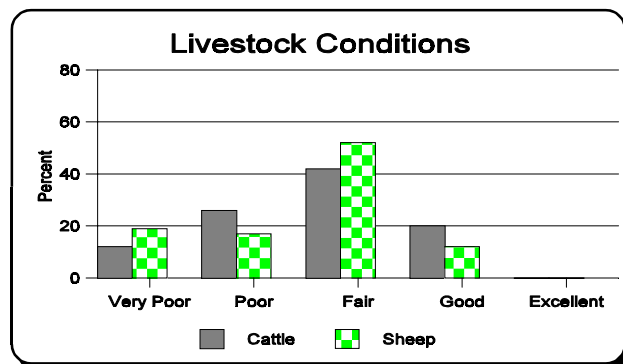
| CROP PROGRESS | | This Week | Last Week | Last Year | 5-Year Average |
|---------------|--------|-----------|-----------|-----------|----------------|
| PLANTED | Cotton | 27 | 20 | 5 | 9 |
| | Corn | 14 | 5 | 9 | 9 |
| | Chile | 76 | 72 | 73 | 82 |
| HEADED | Wheat | 9 | 1/ | 1/ | 1/ |

1/ Not Available



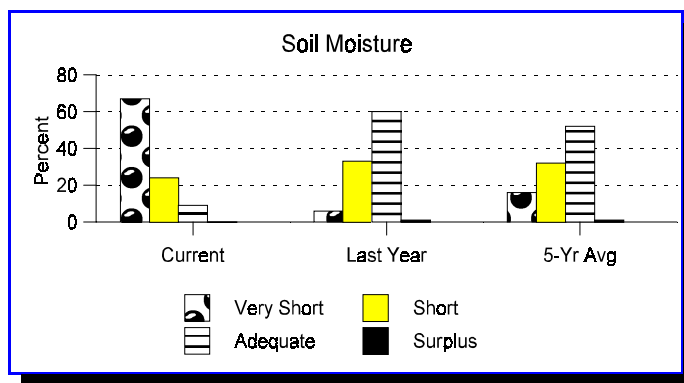
CROP AND LIVESTOCK CONDITION PERCENTAGES

| | Very Poor | Poor | Fair | Good | Excellent |
|-------------|-----------|------|------|------|-----------|
| Alfalfa | 6 | 8 | 52 | 25 | 9 |
| Lettuce | -- | -- | 15 | 40 | 45 |
| Onions | -- | -- | 22 | 48 | 30 |
| Wheat (All) | 37 | 28 | 27 | 7 | 1 |
| Cattle | 12 | 26 | 42 | 20 | -- |
| Sheep | 19 | 17 | 52 | 12 | -- |



SOIL MOISTURE PERCENTAGES

| | Very Short | Short | Adequate | Surplus |
|-----------------|------------|-------|----------|---------|
| Northwest | 61 | 36 | 3 | 0 |
| Northeast | 73 | 27 | -- | -- |
| Southwest | 75 | 13 | 12 | -- |
| Southeast | 49 | 18 | 33 | -- |
| State | 67 | 24 | 9 | -- |
| State-Last Year | 6 | 33 | 60 | 1 |
| State-5-Yr Avg. | 16 | 32 | 51 | 1 |



WEATHER SUMMARY

Most of New Mexico experienced a warm, dry week. Temperatures averaged well above normal everywhere, and the statewide average was 7 degrees above normal. Precipitation was generally light and spotty, with the greatest amounts in the northeast as a storm exited the state at the beginning of the week. Des Moines (.46"), Clayton (.30"), and Red River (.25") were the only spots that collected as much as a quarter inch.

NEW MEXICO WEATHER CONDITIONS APRIL 08-14, 2002

| Station | Temperature | | | Precipitation | | | | |
|---------------|-------------|---------|---------|----------------|----------------|----------------|---------------------|-------------------|
| | Mean | Maximum | Minimum | 04/08 04/14 | 04/01 04/14 | 01/01 04/14 | Normal for April | Normal Jan-Apr |
| Carlsbad | 70.4 | 92 | 50 | T | 0.00 | 0.49 | 2.24 | 1.49 |
| Tatum | 62.6 | 85 | 42 | 0.00 | 0.09 | 0.64 | 4.41 | 2.05 |
| Roswell | 67.3 | 89 | 46 | 0.00 | 0.01 | 0.65 | 2.93 | 1.99 |
| Clayton | 59.1 | 86 | 40 | 0.30 | 0.70 | 0.94 | 0.86 | 2.04 |
| Clovis | 63.0 | 88 | 43 | T | 0.09 | 0.81 | 0.86 | 2.30 |
| Roy | 54.0 | 82 | 38 | 0.00 | 0.10 | 0.82 | 0.32 | 2.14 |
| Tucumcari | 63.6 | 88 | 43 | 0.01 | 0.64 | 0.87 | 1.90 | 2.00 |
| Chama | 45.6 | 71 | 25 | 0.06 | 0.13 | 1.27 | 0.88 | 6.61 |
| Johnson Ranch | 50.9 | 77 | 26 | 0.00 | 0.25 | 0.49 | 0.48 | 2.47 |
| Capulin | 53.3 | 79 | 33 | 0.46 | 1.01 | 1.01 | 1.49 | 2.86 |
| Las Vegas | 53.9 | 79 | 34 | T | 0.10 | 0.89 | 0.34 | 2.16 |
| Los Alamos | 52.5 | 69 | 33 | 0.12 | 0.21 | 1.00 | 0.99 | 3.88 |
| Raton | 53.1 | 84 | 34 | 0.07 | 0.21 | 1.06 | 0.71 | 2.90 |
| Santa Fe | 55.8 | 78 | 31 | 0.00 | 0.62 | 0.81 | 1.19 | 2.87 |
| Red River | 43.6 | 67 | 23 | 0.25 | 0.43 | 1.68 | 2.67 | 5.75 |
| Farmington | 55.6 | 80 | 32 | 0.00 | 0.16 | 0.51 | 0.31 | 2.48 |
| Gallup | 51.9 | 78 | 28 | 0.00 | 0.44 | 0.64 | 0.83 | 3.23 |
| Grants | 52.8 | 80 | 27 | 0.00 | 0.08 | 0.45 | 0.60 | 1.95 |
| Silver City | 57.6 | 79 | 33 | 0.00 | 0.00 | 0.53 | 0.00 | 3.90 |
| Quemado | 50.1 | 77 | 27 | 0.00 | 0.10 | 0.60 | 0.27 | 2.95 |
| Albuquerque | 62.5 | 82 | 42 | 0.00 | 0.37 | 0.52 | 0.78 | 1.96 |
| Carrizozo | 61.1 | 84 | 39 | 0.00 | 0.17 | 0.36 | 1.19 | 2.10 |
| Gran Quivera | 57.8 | 80 | 35 | 0.14 | 0.14 | 0.64 | 0.59 | 2.88 |
| Moriarty | 56.4 | 84 | 31 | 0.00 | 0.27 | 0.66 | 0.71 | 2.10 |
| Ruidoso | 53.4 | 72 | 33 | 0.02 | 0.02 | 0.63 | 0.88 | 4.24 |
| Socorro | 62.6 | 85 | 37 | 0.00 | 0.05 | 0.36 | 0.36 | 1.41 |
| Alamogordo | 65.2 | 84 | 43 | 0.00 | 0.00 | 0.26 | 0.06 | 1.93 |
| Animas | 67.2 | 88 | 44 | 0.00 | 0.00 | 0.20 | 1.28 | 1.86 |
| Deming | 66.1 | 89 | 43 | 0.00 | 0.00 | 0.18 | 0.85 | 1.54 |
| T or C | 67.5 | 87 | 48 | 0.00 | 0.02 | 0.22 | 0.15 | 1.40 |
| Las Cruces | 68.5 | 91 | 45 | 0.00 | 0.00 | 0.21 | 1.20 | 1.26 |

(T) Trace (-) No Report (*) Correction

All reports based on preliminary data. Precipitation data corrected monthly from official observation forms.

COTTON AND WOOL OUTLOOK

USDA, ERS, March, 2002

The latest United States Department of Agriculture (USDA) cotton forecast for 2001/02 indicates a decline in U.S. stocks from last month as a result of increased export expectations. U.S. cotton exports are projected at 10.3 million bales, the highest since 1926/27. Over the last several seasons as U.S. mill consumption has declined, exports have accounted for a larger share of U.S. cotton demand. In 2001/02, the export share is expected to approach 60 percent compared with a 5-year average of less than 40 percent.

Contributing to the higher U.S. cotton export forecast is a record foreign consumption estimated at 84.7 million bales that has raised foreign import needs to their highest since 1994/95, the most recent peak in U.S. exports. Although foreign cotton production is projected at 77.1 million bales in 2001/02, 5.7 million above last season and the second largest ever, stocks are expected to rise only 2.7 million bales. Foreign ending stocks are estimated at 35.5 million bales, 8 percent above 2000/01 but below stocks of the previous four seasons.

Domestic Outlook U.S. Cotton Supply and Demand Overview The 2001/02 U.S. cotton crop remains estimated at 20.1 million bales (upland—19.4 million and extra-long staple—678,000 bales), compared with 17.2 million in 2000/01. The USDA will release final production estimates on May 10th. Based on the current production estimate and beginning stocks of 6 million bales, this season's U.S. supply totaled 26.1 million bales, 5 million above last season and the highest since 1966/67.

However, total demand for U.S. cotton is also projected to rise this season, albeit less than production. Abundant supplies, at relatively cheap prices, are providing the boost in demand—particularly exports. Total demand is expected to reach 17.6 million bales in 2001/02, 2 million above a year ago. Based on this supply and demand outlook, U.S. ending stocks for the current season are forecast 2.5 million bales above last season at 8.5 million. Consequently, the 2001/02 stocks-to-use ratio is expected to rise to 48 percent, the highest in 13 years.

U.S. Cotton Demand Revised Upward While U.S. cotton supply was unchanged in March, demand was increased about 2 percent as a result of a higher

export forecast. U.S. mill use was unchanged at 7.3 million bales, 18 percent below 2000/01. U.S. cotton exports were raised 3 percent to 10.3 million bales this month, as strong sales and shipments continue to be reported. In addition to large U.S. exportable supplies at competitive prices this season, a 10-percent increase from last year's foreign import demand to help satisfy rising foreign cotton consumption is also benefiting U.S. shipments in 2001/02.

During the first 7 months of 2001/02, U.S. cotton exports—according to **Export Sales** reports—have totaled approximately 6.3 million bales, 3 million above last year and 61 percent of the latest export forecast. As a result, shipments during the last 5 months of the season need to average only about 180,000 bales per week to reach the 10.3-million-bale forecast. Based on current estimates, the U.S. share of global trade is projected at 35.4 percent, the largest share in over 40 years.

Textile Trade Deficit Widens in 2001 U.S. textile imports totaled 901 million pounds (raw-fiber equivalent) last December, 11 percent below November and 6 percent below a year earlier. Imports of all major fibers, except silk, were lower than November. Similarly, imports of all major end-use categories declined in December, compared with a month earlier. Apparel imports, at 582 million pounds, were 13 percent below November.

December textile exports also declined from a month earlier, totaling 312 million pounds. Exports were 20 percent below a month earlier and a year ago. Total exports declined in each major end-use category and for all fiber types. Cotton textile exports declined to 130 million pounds, 22 percent below a month earlier.

Total 2001 textile imports reached 13.5 billion pounds, 123 million pounds (1 percent) below 2000. Similarly, textile exports totaled 4.9 billion pounds, a reduction of 431 million (8 percent) from a year ago. However, the total trade deficit reached 8.6 billion pounds in 2001, compared with 8.3 billion in 2000 and 7.4 billion in 1999. Cotton accounted for 62 percent (5.4 billion pounds) of the deficit. Twenty-eight percent of the deficit was attributed to manmade fibers, while 3 percent came from wool textiles. The remaining 7 percent came from silk and linen textiles, with the latter accounting for 5 percent.

U.S. Domestic Consumption Shrinks in 2001 U.S. domestic fiber consumption (mill use plus net textile trade) in calendar year 2001 declined for the first time in 6 years. The decrease resulted from both reduced fiber mill use by the U.S. industry and lower textile and apparel imports from other countries. The sluggish U.S. economy, compounded by the events of September 11th, took its toll on U.S. consumer demand for these products in 2001.

Total domestic fiber consumption in 2001 equaled 23.6 billion pounds. While nearly 4 percent below the record of 2000, consumption was also the lowest level in 3 years. The reduction in total domestic consumption came from smaller use of each fiber, with cotton accounting for 70 percent of the decrease.

In 2001, U.S. mill use of all fibers fell 7 percent to 15 billion pounds, the fourth consecutive year of decline and the lowest since 1992. Once again, cotton was responsible for the bulk of the reduction—accounting for nearly 75 percent of the drop.

In comparison, 2001 textile and apparel imports of all fibers reached 13.5 billion pounds, 1 percent below 2000 for its first decline since 1988. Increased globalization and trade agreements have buoyed U.S. textile trade, with U.S. net imports more than doubling during the past decade.

Focusing on cotton, U.S. domestic consumption of the fiber reached only 9.2 billion pounds in 2001, 6 percent below the previous year. Despite the decline, cotton is still credited with 39 percent of all fibers consumed in the United States, slightly below the 5-year average.

Although U.S. domestic consumption of cotton had been expanding for four consecutive years prior to 2001, imported products accounted for the gain and they continued to capture a larger share of the U.S. market in 2001. As a result, U.S. cotton mill use has fallen since 1997 when the U.S. industry consumed 5.4 billion pounds. During 2001, only 3.9 billion pounds of cotton were used, about 26 percent of total U.S. fiber mill use and the lowest since 1988.

While trade agreements have encouraged U.S. cotton textile and apparel trade, the dollar's strength over the last several years has also attracted additional imports into the United States. In 2001, these imports totaled 7.5 billion pounds, slightly below 2000 but nearly double the level of 1994.

Likewise, net textile imports have expanded significantly despite rising cotton textile exports during this period. In 2001, net imports captured 58 percent of the U.S. market, compared with only 30 percent in 1991. In contrast, U.S. 2001 cotton mill use accounted for only 42 percent, down more than 25 percentage points from a decade earlier.